



## EXECUTIVE SUMMARY

The Guide to Special Events was created to provide an improved internal communications process through a shared, university-wide protocol that enables event planners to focus and maximize resources leading to effective event outcomes.

- Events are opportunities to build on the positive reputation of the University of Tennessee.
- Special events are regularly conducted at all levels and locations throughout the state in support of the university's strategic vision.
- Special events can generate publicity, strengthen positive relationships, and assist the university in fundraising and in enhancing its market position.
- Every event, regardless of its size and scope, impacts the image of the University of Tennessee.
- To promote a positive image of the university, every event must be well organized, well executed, imaginative and interactive.

## SPECIAL EVENTS CALENDAR

One of the goals of this guide is to better utilize the university's resources by helping to identify existing event opportunities. The university events calendar is key in identifying venues and events in which presidential representation is beneficial. The process for recommending event participation is outlined below:

1. To avoid conflicts of already-planned events, refer to the university events calendar prior to requesting presidential appearance.
2. Updating the university events calendar:
  - The Director of Special Events will maintain the university events calendar and distribute it monthly to the President's staff.
  - Campus, Institute, and Departmental contacts are responsible for updating the university events calendar.
  - Each campus, department, or institute will assign the appropriate users and authors and report their full names and NET IDs to the Director of Special Events, who will grant access to the calendar. There are two types of defined personnel that will have access to the calendar, Users and Authors...
    - *Users* will be able to view, sort and download event information.
    - *Authors* will have the additional capability to create and edit events.
3. If an event requires a presidential appearance, fill out the on-line presidential attendance request form (<http://president.tennessee.edu/request/>). This request is also available from the university events calendar.
4. For short-notice events (6 to 8 weeks), immediately contact the President's assistant for the President's availability. Then, follow by completing the on-line presidential attendance request form.
5. To view the Special Events calendar, simply visit the website at [www.tennessee.edu/calendar](http://www.tennessee.edu/calendar)
6. At the login screen, type your user ID and password which is the same as your Net ID and password. This will bring you to the calendar home page. On the home page you will be able to create an event, search or download.
7. **Search Events:** You can search by date, location or both. Location search allows you to view events by campus. Care must be taken not to overlook events that are of interest to your unit but were entered using a location code of other. They will not be displayed unless selected as an additional search category. To select more than one location code; press control and click on the locations you want to include in the search.
8. **Creating a New Event:** Click the Create New Event button and fill in the event information fields. Make sure the name of the event is entered how you want it to appear on the calendar. Hit create when finished. You will see a pop-up saying "New event created" and/or error message. Correct the errors and hit create again. Hit new search to go back to the home page. **NOTE:** You can enter an event with just the month and year if the exact date isn't known yet.



9. To view the event, conduct a search from the home page. Enter an exact date, date range or location. The results will be displayed. From this screen you can select events to view the full details and edit events if you are the author. If your search results in more than 20 events you can navigate using the Previous and Next buttons. You can download your search results into an Excel spreadsheet. You will be prompted to open, save or cancel. Choosing Open allows you to view a web version but not edit. Choosing Save puts the file in a folder and allows you to edit, reformat and save.
10. **Limitations:** The column width automatically adjusts slightly depending on the data received to make the spreadsheet easily viewable on the computer screen. Some settings have to be manually adjusted to print the calendar. Going into the page setup and changing the left and right margins to .25 and the layout to landscape will normally correct this problem. If it does not, you may have to manually adjust some of the column widths. It suggested that you repeat the top line (years) while in the page set up per the instructions.
11. **Distribution:** A printed 3 year view of this calendar will be distributed to the President's staff on a monthly basis. All users and authors can download and distribute locally as needed. Information about the calendar will be distributed to assigned Authors. The unit authors are responsible for passing that information to their users as they deem appropriate/necessary.
12. **Changes:** Recommend changes to the Director of Special Events.
13. **Conclusion:** This calendar will only be as good as its inputs. To be a valuable tool each unit must ensure procedures are in place to get events entered and updated in a timely and accurate fashion.

### **OVERVIEW OF EVENT PROTOCOLS**

1. Procedures (including the university events calendar) are planning tools and do not impact the President's scheduling calendar until the President is officially requested.
2. Protocols should be considered guidelines and can be adjusted as necessary based on the event's specific requirements.
3. Funding responsibility for special events remains the responsibility of the university unit planning the event. If the Office of Special Events is assisting in coordinating resources, some charges may initially be applied using the special events funding code. Transfer vouchers will be completed after the event to recoup funds as necessary from the designated unit account.
4. The Director of Special Events has the authority to commit discretionary funds if it becomes necessary to meet university goals and/or expectations.
5. When the President is participating in the event, event planners will provide information in accordance with the *specific event protocol*
6. Event planners must make reasonable efforts to ensure all university events that include public participation are designed for accessibility.

### **EVENT PROTOCOLS INVOLVING DIGNITARIES OR SPECIAL GUESTS**

Dignitaries are defined as persons of high rank or position. More specifically, and in regard to the policies set forth, dignitaries are defined as legislators, celebrities, business/community leaders and major donors.

1. Events involving dignitaries should be viewed as potential opportunities and placed on the university events calendar.
2. For security purposes, events involving dignitaries will be tagged with the letters DV in the event title instead of the dignitaries' name.
3. Special security precautions should be planned for dignitaries who have advance/security teams. Sharing details such as names, places, times and activities via cell phone and email should be avoided if possible.
4. Sometimes venues chosen for functionality and/or atmosphere may not be appropriate for security purposes.



5. In order to assist with coordination, one university employee should be designated as the point of contact (POC) for advance/security teams. Advance teams will want to meet with some university units directly (i.e., law enforcement), but the university POC should facilitate this by connecting the advance team with the proper university unit contact and be present at these meetings.
6. While not identified as dignitaries, certain university officials should be extended proper courtesies. Members of the Board of Trustees, the President, and campus/institute chief executives and spouses fall in this category.
7. Attention to detail, especially in regard to courtesies and protocols, is imperative to the event running smoothly and professionally. The foundation of this effort is based on representing the university and not validating the status of the visitor. At a minimum the following courtesies will be extended to all DVs:
  - a. Reserved Parking:
    - Ensure visiting dignitaries know, prior to their arrival, that they have access to reserved parking. Also, make sure parking attendants have an updated reserved parking list. In some cases, it may be appropriate to have escorts meet DVs in the parking area.
  - b. Reserved Seating
    - Seating DVs requires detailed planning. Some of the details include: where they sit (dais, ceremony chairs or luncheon tables), with whom they are seated and how they are informed of where to sit. All seats should be filled at DV tables (be prepared to fill seats on short notice because of cancellations and/or no-shows).
    - In order to enhance social/business relationships, event planners need to provide the seating chart to the Director of Special Events for review when system leadership is attending the event. This allows the Director of Special Events an opportunity to provide input on matching system leadership with DVs.
    - When the desired event climate indicates that assigned seating be avoided, still chart who will occupy the table at which the hosts and honorees are seated.
  - c. Guest relations: refers to activities, services, demands and expectations, as well as verbal or non-verbal interaction or social contact during specific events which are organized by the university.
    - Escorts will be assigned to welcome DVs, inform them of their seating assignments in addition to the program and their participation within the event.
    - Escorts do not need to shadow the DV for the duration of the event. Depending on the type of event, escorts may be assigned to handle more than one DV.
  - d. Prior to the event, biography information will be shared with attending UT leadership
8. Gifts for DVs are appropriate. Because of ethics rules, legislators are unable to accept gifts.
9. Green room requirements are determined based on 1) the type of program and 2) the DVs who are in attendance. Include this information in executive briefing packets.
10. It is important that all DVs of equivalent status are extended the same courtesies. Any deviation, such as "head table" seating or participation in the ceremony should be cleared through the Director of Special Events.

## **INVITATIONS**

Invitations create the first impression for an event and often determine the attendance.

1. Invitations come from people, not organizations. Therefore, for events within the university system, invitations should always come from university officials and not from University of Tennessee units. Invitations listing the President as host or co-host must be reviewed by the Director of Special Events prior to printing. The planned invitee list should accompany the draft invitation.
2. Please provide any invitation list that contains state or federal legislators to the Director of Special Events for review. The list must be reviewed by the UT government relations offices.



3. The invitation should be consistent with the type and theme of the event planned (including media prints). A review of the invitation should include answers to questions your guests may have. Particular attention should be paid to the event purpose, which should inform as well as solicit a response. Including concise but exciting event details may make the difference in a guests' decision to attend. Be sure to send invitations to guest speakers, honorees and ceremony participants; it is proper to invite them even if prior coordination was made to arrange their involvement. If practical, remove the RSVP from their invitation.
4. Types of invitations:
  - a. Formal:
    - Use university white, embossed-seal invitations, appropriate for use by Board of Trustees, President and unit chief executives and for "black-tie" events.
    - Accompany a RSVP card.
    - Use black ink only.
    - Use offset printing or thermography in script font.
    - Use a handwritten/computer generated address on envelope (no labels).
    - Include titles and spell out times and dates.
    - Never use a postage meter.
  - b. More cost-efficient formal option:
    - Use a printed university seal, also appropriate for use by Board of Trustees, President and unit chief executives.
    - Use the same information standards but on locally-produced university seal invitation card.
    - Use quality card stock.
    - Use dark ink, in an easy-to-read font, printed on the envelope.
    - Include RSVP information, which will be gathered via phone or email.
  - c. Informal:
    - Use can range from a postcard to a business letter, which allows for more design flexibility.
    - Use a university word mark, graphic element, or UT Icon. (see graphic identity guidelines).
    - Use electronic invites internally. Emails used to invite faculty/staff as university representatives are appropriate. E-vite services are appropriate for casual events; however, do not deliver as text-only emails.
    - Fill-in invitations will not be used (does not prohibit fill in response cards).
5. Timelines:
  - a. Send save-the-dates 6 months to a year in advance for major events, including multi-day meetings or when international travel is involved. Invitations are sent 2-3 months in advance.
  - b. Send invites 4-6 weeks in advance for important social events, facilities ceremonies, prestigious affairs, evening receptions/breakfasts/luncheons/dinners
  - c. Send invites 3-4 weeks in advance for tea, receptions or informal social events.
  - d. Reminders should be sent 2-3 weeks in advance.
6. Standard protocol for invitation design is:
  - Line 1: Organizational Symbol – must be in accordance with the Graphic Identity Guidelines. The manual can be downloaded at <http://pr.tennessee.edu/identity>.
  - Line 2: Introduces the host(s)
  - Line 3: Extends the invitation (e.g. cordially invites you...)
  - Line 4: Describes the type of event
  - Line 5: Describes the purpose of the event
  - Line 6: States the date
  - Line 7: States the hour
  - Line 8: States the place
  - Line 9: Includes special instructions (bottom-right)
  - Line 10: Includes RSVP information (bottom-left)



<p><i>President and Mrs. Joe DiPietro cordially invite you to a reception celebrating the statewide impact of The University of Tennessee</i></p> <p><i>December 1, 2011 from 5:00 to 7:00 p.m.</i></p> <p><i>123 University Blvd Knoxville, Tennessee</i></p> <p><i>RSVP: (865)123-4567      Business dress utrsvp@tennessee.edu      heavy hors d'oeuvres</i></p>	<ol style="list-style-type: none"> <li>1. University Symbol</li> <li>2. Names of hosts</li> <li>3. Phrasing the invitation</li> <li>4. The kind of event</li> <li>5. Purpose of the event</li>   <li>6. Date</li> <li>7. Time</li> <li>8. Place</li>   <li>9. Special instructions</li> <li>10. Where to R.S.V.P.</li> </ol>
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**SEATING ON THE DIAS**

1. Have the dais occupied in an orderly manner. This presents a more organized ceremony and helps signal other guests the ceremony is about to begin.
2. When appropriate, keep seating on the dais focused on the speakers & honorees. Other dignitaries and/or participants may have reserved seating up front.
3. List people seated on the dais by rank/seniority. Seating is established by rank from right to left as you face the audience. If the podium is center stage, facing the audience: the highest ranked participant sits to the right of the podium; the next position of honor is to the left of the podium; and the seating continues to alternate in this manner from the podium to the outer edges of the platform.
4. Rank always takes precedence in protocol decisions; however, it may be appropriate and more functional, while seating, to alternate participants from different organizations, i.e. alternating between university officials and donors. The participants are still ranked within their category.

**MEDIA COVERAGE**

Media coverage is often an important part of achieving or maximizing the goals of a special event. Event planners desiring media coverage should contact their unit's media relations office early in event planning.

**SYSTEM REQUIREMENTS**

Events involving presidential representation need to meet the below expectations in order to consistently maintain President's office and the university's brand image and to provide the President with standardized information in preparation for the event.



### **NAME TAGS**

1. Name tags should be typed in a large readable font. Hand-written nametags should be avoided if possible.
2. Names should be all caps, first name centered on the top line, last name centered on the bottom line. Titles generally will not be used. Exceptions occur when identifying legislators or military by rank as appropriate, such as SEN or REP. Identifying political party is not appropriate.
3. Neck bands should be available for guests whose clothing does not support a clip name tag.

The following information will be provided to the President's Assistant and carbon copy the Director of Special Events for all events involving presidential representation as part of the event briefing:

### **GUEST LIST**

Lists should be in an Excel spreadsheet and provide the minimum of the below information:

1. Invitee and guests first and last names
2. Response column for RSVP (with total number of guests)
3. Affiliation to UT (alumni, donor, UT title)
4. Remarks column for additional information like dietary restrictions, disabilities or special interest
5. Additional fields as necessary for information like ticket requirements, etc
6. Date of update in the upper right corner
7. When developing guest lists, consider inviting appropriate system counterparts as the host-unit personnel attending an event. This may apply to other units depending on the event and location. For example, UTSI hosts a development function in Knoxville at which the Director of Development will attend and invites both the system and UTK senior development executives.
8. Identify guests that warrant a focused approach from the President. This means having the President prepared to discuss a specific topic or ensure that guests have one –on-one time with him during the event. This is especially important at larger functions so that quality interaction with the right guests occurs.
9. Full addresses are required if invitations are being mailed by the president's office
10. List university faculty/staff and honored guests that are participants in a program or have special seating separately but on the same spreadsheet
11. List university faculty/staff that are working the event in the same manner. This is important to making the guest list clear for RSVPs and nametags when university personnel and/or honorees are invited separately.

### **BIOGRAPHIES**

Biography requirements vary by event, but in general, the minimum requirements for larger events are listed below. This information could be combined on the Excel spreadsheet with guest list if practical.

1. Full name w/title(Dr., Mr., etc) (how addressed informally in parenthesis e.g. Joseph=Joe)
  - Business title- (brief description of title if not self-evident)
  - Connection w/ UT: (reason for attending the event?)
  - Special assistance requirements, if known
  - Focused approach or a distinguished visitor. (add a relevant fact or two in the remarks if the guest is identified as such)
  - Date of update in the upper right corner
2. For smaller events an enhanced biography should be provided. It should be 4-5 sentences with relevant information on education, work history, and interesting facts about personal life (spouse, children, hobbies etc). Insight into why they are in attendance and what the goal of the focused approach is. It should be provided in MS Word 12 pt font with the event name centered at the top in 18pt bold. Each paragraph should begin with the guest's name underlined and a space between paragraphs.



### **RESERVED PARKING PLAN**

Provide a list of which guests have reserved parking and the location of parking along with any other necessary details.

### **RESERVED SEATING PLAN**

Reserved seating isn't appropriate for all events, but at a minimum, provide your plan for how seating will be arranged along with dais and head-table seating.

**Facilities Ceremonies** (*ground breaking, dedication, naming & topping off*) are important stewardship and development functions. The investment in properly recognizing donors/legislators pays dividends in goodwill with university supporters and helps cultivate future gifts. The majority of these ceremonies will be hosted by a campus/institute and the President will be a co-host. When appropriate, the President may choose to host facilities ceremonies in which statewide or national entities where significant partners in the process.

1. Timing of facilities ceremonies must be considered carefully.
  - a. Groundbreaking ceremonies must be done after all construction contracts are approved but before construction progresses past initial earthwork. An additional process step is added for ground breaking ceremonies. **Before finalizing a date you must first get approval of the date from the Associate Vice President for Capital Projects.** This will require having an approved construction contract. This additional step is designed to avoid the potentially embarrassing rescheduling of ceremonies and will be coordinated through the Director of Special Events.
  - b. **Topping off ceremonies coincide with the placement of the last structural beam.**
  - c. Dedication ceremonies are scheduled after completion of the project and as close to occupation/use as possible.
  - d. Naming ceremonies can be done in conjunction with the dedication or as an independent event if new construction is not involved.
2. Look for opportunities to tie multiple construction projects under a common theme. This can be done by function or geography when appropriate and will allow the use of some common elements. Combining construction projects under a common theme presents them as a campaign and creates the image of calculated growth and could potentially improve donor support and media interest.
3. Consider inviting potential donors for related projects to the above ceremonies so they can witness recognition first hand.
4. It is often hard to attract crowds to facilities ceremonies. Consider combining the ceremony with other events to cross promote and attract the target audience. Fill out the crowd with faculty, staff and students who will benefit from the new facility. Faculty and staff invitations should include at a minimum the following:
  - Deans and Directors of the unit where the event is taking place.
  - Emeriti Presidents
  - Unit Emeriti Chief Executives
  - President's staff (VPs)
  - Unit Chief Executive staff members (VCs)
  - University First Lady and chief executives spouses
  - Associate Vice President for Capital Projects
  - University architect
  - Chief Facilities Officer for Campus/Institute
  - Campaign volunteers associated with funding of building
5. Other potential invitations:
  - Governor and legislators (mandatory if state funds used)
  - State Building Commission members (mandatory if state funds used)
  - UT Board of Trustees (Vice Chair – Mandatory if state funds used)
  - Construction company owner
  - Project Manager of construction company
  - Architects (rep for each firm employed)



6. **The invitation list will be provided to the Director of Special Events for review of legislative invites. All invitations sent to elected officials will be coordinated through the appropriate UT government relations office.**
7. Request a date for the President's participation in accordance with the process in Specific Event Protocol Overview
8. Ceremony Program
  - a. The Director of Special Events is available to advise the ceremony planning committee. Detailed information discussed during planning will assist in meeting the *System Requirements*
  - b. Speaker order is determined by rank in ascending order, ending with the honoree. The Master of Ceremonies may introduce the speakers, or each speaker may introduce the next. Speaking order from programs involving the President, legislators or Trustees will be reviewed by the Director of Special Events.
  - c. Ceremony participants will vary but some standards are: Governor and Vice Chair of the Board of Trustees (if state funds used), President, unit chief executives, department chief executives, student representatives that will benefit from the facility, and the donors/honorees.
  - d. Bullet style talking points for the President will be provided to the Director of Communications. Review speaker remarks for overlap if possible. This can be done for university staff participants at a minimum.
  - e. The "run of show" should include the script and notations for ceremony cues (e.g. dais moves to shovel location).
  - f. Facilities ceremonies should not exceed one hour if possible.
9. Seating on the dias (refer to event protocols involving Dignitaries of Special Guests)



**THE GUIDE TO SPECIAL EVENTS – SYSTEM REQUIREMENTS  
CHECKLIST**

**Scheduling**

- Schedule the president by filling out the on-line form (see the on-line form at [www.president.tennessee.edu](http://www.president.tennessee.edu) or access through the university calendar <http://www.tennessee.edu/calendar/> .)
- Determine the president's level of participation
- Indicate in comment section if requesting participation from the Director of Special Events
- Compare university events calendar with local calendar when setting event date (<http://www.tennessee.edu/calendar/>.)
- Ensure approved event is entered on university events calendar
- Fill out the event briefing form no later than two weeks prior to event (request the form from Jane Pullum at [jpullum@tennessee.edu](mailto:jpullum@tennessee.edu), copy Keith Carver at [carver@tennessee.edu](mailto:carver@tennessee.edu) and Mike Gregory at [mike.gregory@tennessee.edu](mailto:mike.gregory@tennessee.edu))

**General protocol**

- Identify dignitaries attending university events to the Director of Special Events
- Parking: provide reserved parking plans for dignitaries to the Director of Special Events
- Assign escorts to dignitaries
- Seating: provide reserved seating plans for dignitaries to the Director of Special Events in accordance to *Reserved seating*
- Stage arrangements: in accordance with seating on a dais/stage
- Provide any guest list containing legislators regardless of host
- When necessary, provide green rooms for visiting dignitaries – inform the Director of Special Events of green room arrangements.
- Gift(s): report planned gifts to DVs of honorees
- Facilities ceremonies: coordinate planning for facilities ceremonies with the Director of Special Events.

**Specific protocols for the events that involve the president**

- Name tags: ensure name tags are in accordance with the guidelines
- Guest list: provide the guest list to President's assistant and Director of Special Events in accordance with this guide
- Biographies: provide biographies are in accordance with this guide

**Invitations:**

- In cases when the President is the host or co-host, provide a draft of the invitations to the Director of Special Events two weeks prior to printing.
- Provide planned invitees list with draft guest invitation.